

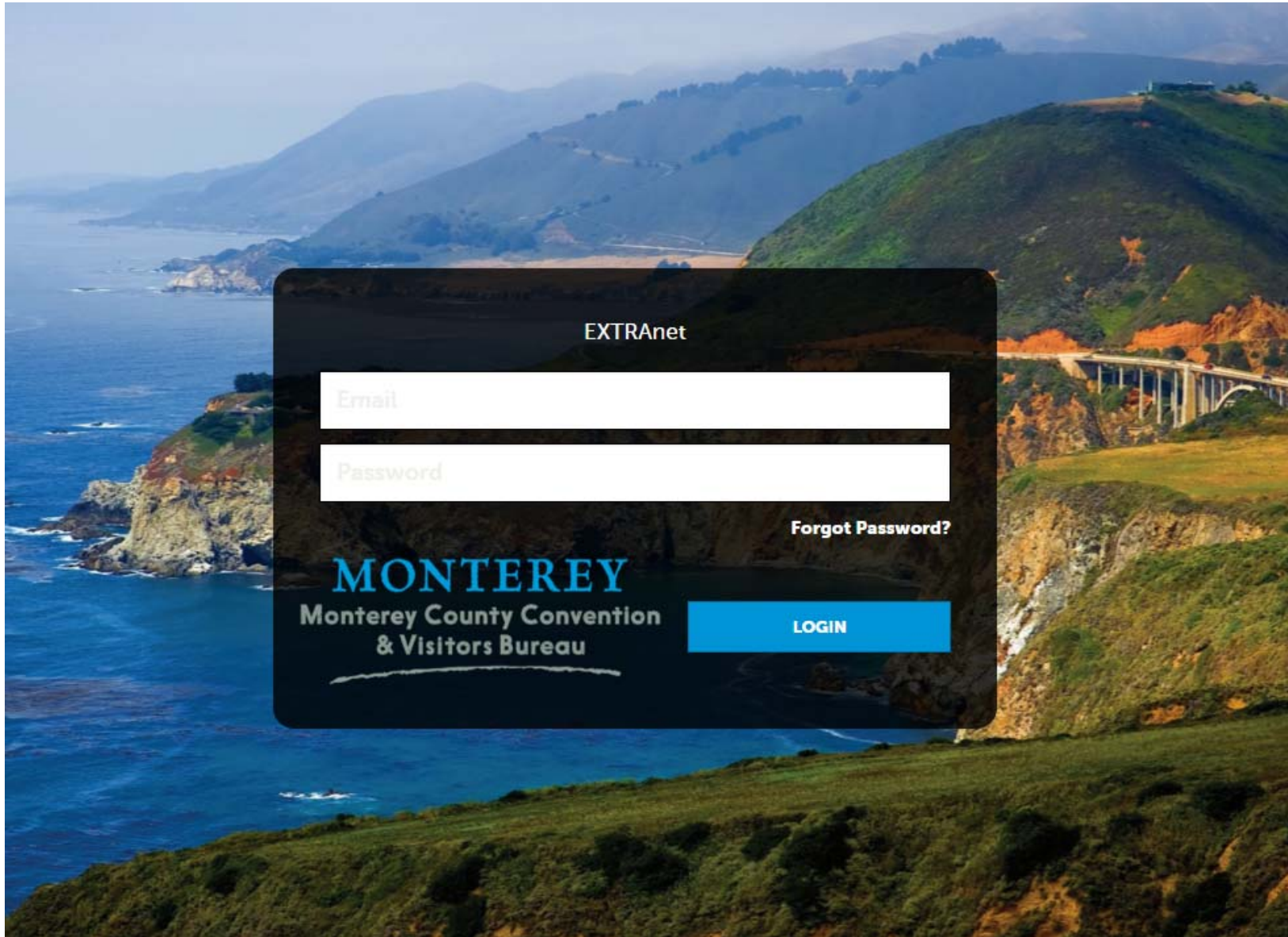
# **MONTEREY**

**Monterey County Convention  
& Visitors Bureau**



**EXTRAnet 4.0 User Instructions**

# Login Screen



# Home Screen – 4.0

MONTEREY  
Monterey County Convention & Visitors Bureau

Extranet EXTRA.net

Kit@seemonterey.com Logout

Monterey County Convention & Visitors Bureau

At A Glance (Current Month) [See All](#)

0 Listing Views

0 Listing Click Throughs

Partner Bulletins

All Bulletins

**At A Glance** is a brief view of an Account's listings tracking. Clicking on the **See All** link to the right, engages a more detailed view of the Account and its interactions with the Bureau.

# Home Screen (cont'd)

[Extranet](#)   [EXTRAnet](#)   [Kit@seemonterey.com](#)   [Logout](#)   Monterey County Convention & Visitors Bureau

- [Home](#)
- [Profile](#)
- [Dashboard](#)
- [Reports](#)
- [Tools](#)
- [Settings](#)

## Benefits

- [Listings](#)
- [Offers](#)
- [Leads/RFPs](#)
- [Service Requests](#)

PRINT

**Account**

-All- ▼

**Month**

May ▼

**Year**

2015 ▼

**TO**

**Month**

April ▼

**Year**

### Listings [See Details](#)

Views ▼

Month	Count
May	67
Jun	86
Jul	12
Aug	0
Sep	0
Oct	0
Nov	0
Dec	0
Jan	0
Feb	10
Mar	0
Apr	0

### Offers [See Details](#)

Sent ▼

### Leads/RFPs [See Details](#)

Sent ▼

Month	Count
May	0
Jun	0
Jul	0
Aug	0
Sep	0
Oct	0
Nov	0
Dec	1
Jan	0
Feb	0
Mar	0
Apr	0

### Services [See Details](#)

Service Requests Ser

# Home Screen (cont'd)

The screenshot shows the Extranet interface for the Monterey County Convention & Visitors Bureau. The top navigation bar includes the logo, user information (Kit@seemonterey.com), and a search icon. A left sidebar contains navigation icons for home, user profile, images, announcements, charts, and settings. The main content area features a 'At A Glance (Current Month)' section with two cards: '0 Listing Views' and '0 Listing Click Throughs'. Below this is a 'Partner Bulletins' section with a dropdown menu set to 'All Bulletins'. A red arrow points to the dropdown menu.

**Partner Bulletins** are important notices, documentation, events, etc. posted by the Bureau. Important bulletins will be marked with a blue and white exclamation mark.

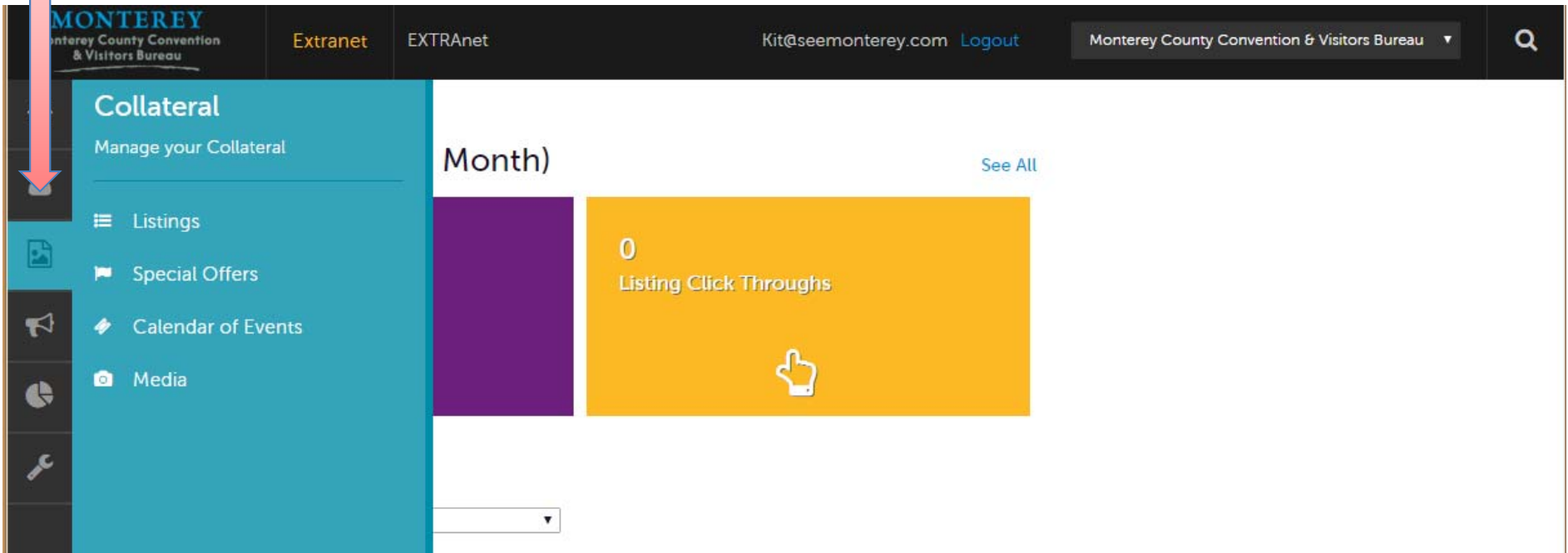
# Home Screen (cont'd)

The screenshot displays the user interface of the Monterey County Convention & Visitors Bureau Extranet. The top navigation bar includes the organization's name, 'Extranet EXTRAnet', the user's email address 'Kit@seemonterey.com', and a 'Logout' button. A search icon is located in the top right corner. The left sidebar, titled 'Member Profile', offers navigation to 'Accounts', 'Contacts', 'My Benefits', and 'Invoices'. A red arrow highlights the 'Member Profile' icon. The main content area features a purple card and a yellow card showing '0 Listing Click Throughs' with a hand cursor icon. A 'See All' link is positioned to the right of the purple card.

Clicking the **Member Profile** icon displays the Accounts information, such as contacts, Account details and information about interaction with the Bureau (same as the See All link in the At A Glance section), in addition to invoices sent by the Bureau.

Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.

# Home Screen (cont'd)



Clicking the **Collateral** icon, displays options for listings, special offers, calendar of events, and media (i.e. images).

Note: Some of these options are just view and/or edit and/or add. More on these options later in the presentation.

# Home Screen (cont'd)

MONTEREY  
Monterey County Convention  
& Visitors Bureau

Extranet EXTRAnet

Kit@seemonterey.com Logout

Monterey County Convention & Visitors Bureau

Opportunities  
Manage your Opportunities

- RFPs
- Media Leads
- Service Requests

Month) [See All](#)

0  
Listing Click Throughs

Clicking the **Opportunities** icon, displays options for RFPs sent by the Bureau. Opportunities are broken into RFPs (Meeting and Tour Leads), Media Leads (travel writer RFPs), Service Requests (non-room specific RFPs).

More on these options later in the presentation.



# Home Screen (cont'd)

The screenshot displays the Simpleview Extranet interface. At the top, the navigation bar includes the Simpleview logo, the word "Extranet", the text "Simpleview Demo CRM Partners", the user email "user@simpleviewinc.com", a "Logout" link, and a "Simpleview Hotel an" button. On the left, a vertical sidebar contains icons for Home, Profile, Reports (highlighted with a red arrow), Dashboard, and Settings. The main content area is titled "Reports" and features a section "Important Reports for Our Partners" with two entries: "2014 TAP Report - 2" (with subtext "Our 2014 TAP Report") and "2014 STR Report" (with subtext "Our 2014 STR").

By clicking the **Reports** icon, displays reports the Bureau has posted. To view a report just click the name of the report.

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# Filters and Data Grids

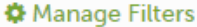
Let's take some time to discuss settings that can be customized by each user for themselves in the EXTRANet.

1. **Filters** – Several pages of the EXTRANet will contain a Filters section. This section allows you to narrow down the results displayed on the page. The default filters can be adjusted by clicking the **Manage Filters\*** option in the top right corner of this section.
2. **Data Grids** – When viewing pages with filter options, just below the filters is a data grid. This data grid will display a list of records matching the criteria specified in the filters. Each default column heading in a data grid can be modified by clicking the **sprocket\*** icon in the top right corner of the grid.

\* Remember, any adjustments made with the **sprocket** or the **Manage Filters** apply only to the person making the changes.

# Filters and Data Grids

## RFPs

**Filters (1)**  Manage Filters

**Responded is:**

**Lead Name contains:**

**Lead ID contains:**

**Group Type is one of:**

**Response Date:**

**Create Date:**

**Organization contains:**





**Status is one of:**

**APPLY FILTERS** **CLEAR FILTERS**

Here is an example of the RFPs filter page. Once the desired criteria have been set in the filters, click the **Apply Filters** button to see the results. Notice the **Manage Filters** button that was mentioned previously.

# Filters and Data Grids (cont'd)

**ADD OFFER** Page 1 of 1 Go to Page: 1

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending	
  	20% Off Rooms Sunday Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Page 1 of 1 Go to Page: 1

Once the filters have been applied, the data grid will update with the matching results. Several icons may appear on the records within the grid. The appearance of these icons will depend on the page being viewed.

These icons are:

1. **Pencil** – allows editing of a record
2. **Eyeball** – allows viewing of a record
3. **Clone** – allows duplicating of a record
4. **Add Button** - Depending on the page, an Add button may appear in the top left of the data grid. When this option is available, clicking allows the addition of a new record.

Notice the **sprocket** icon that was mentioned previously.

# Filters and Data Grids (cont'd)

The screenshot displays the 'RFPs' interface with a configuration menu open. The menu has three tabs: 'Columns', 'Filters', and 'Ordering'. The 'Filters' tab is selected, showing a list of filter options with checkboxes. The options are: 'Account', 'Arrival (Preferred)', 'Create Date' (checked), 'Decision Date', 'Departure (Preferred)', 'Group Type' (checked), and 'Lead ID' (checked). Below the list, there are two filter configuration sections: 'Create Date' with a dropdown menu set to '-All Dates-' and 'Group Type' with a 'CHOOSE' dropdown menu. The main interface shows a grid of filter fields for 'Responded is', 'Lead Name contains', 'Lead ID contains', 'Group Type is one of', 'Response Date', 'Create Date', 'Organization contains', and 'Status is one of'.

Clicking on the **sprocket** icon or the **Manage Filters** button will trigger a menu as shown here. This menu provides options for personalizing the filters, data grid columns, and the ordering in which each column appears. By changing these options, changing of these options effects **ONLY** the person making the changes.

# Manage Profile - Accounts

Accounts

Filters (0) [Manage Filters](#)

Account is one of:

CHOOSE ▾

APPLY FILTERS

Page 1 of 1 Go to Page: 1

Actions	Account
▾	Simpleview Hotel and Conference Center
	<ul style="list-style-type: none"><li>Manage Amenities</li><li>Manage Meeting Space</li></ul>

Page 1 of 1 Go to Page: 1

After you click the Profile icon and then Accounts, you will be presented with your Account name and various actions you can perform. If you see multiple Account names, this is due to your contact Login ID and password being associated with another Account. The pencil icon will allow you to edit your Account information. By clicking the eyeball icon, you can view your Account information. The down arrow icon will allow you to view and edit your amenity and meeting space information.

# Manage Profile - Accounts (cont'd)

The screenshot displays a web interface for managing account profiles. On the left, a vertical sidebar contains navigation icons and a list of sections: Account Information, Phone Information, Address Information, New Group, Hotel Incentive Fund, Social Media, and General. A red arrow points to the 'Account Information' link. Above the sidebar are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. The main content area is divided into sections. The top section, titled 'Account:', contains a text input field with 'Simpleview Hotel and Conference Center' and a dropdown menu for 'Region:' with 'North' selected and a 'Required' indicator. Below this is a 'Website:' section with a text input field containing 'www.simpleviewinc.com'. The bottom section, titled 'Phone Information', features two columns: 'Primary:' and 'Alternate:'. Each column has a text input field, a grey 'Ext' button, and another text input field.

When you view or edit your Account information, you can quickly scroll to a section on the page by clicking the links on the left of the page. If you are viewing the Account , the top left will display an Edit button. If you are editing the Account , the top left will display a Save button. You must click the Save button before changes are applied!

# Manage Profile - Contacts

**Contacts**

Filters (0) Manage Filters

Account is one of:

Contact Type is:

**APPLY FILTERS**

**ADD CONTACT** ←

Page 1 of 1 Go to Page:  →

Actions	Full Name	Account	Title	Email	Contact Type	
	Angel Berry	Simpleview Hotel and Conference Center		aberry@simpleviewinc.com	Primary	
	Alena Chaika	Simpleview Hotel and Conference Center		achaika@simpleviewinc.com	Secondary	

After you click the Profile icon and then Contacts, you will be presented with a list of all the contacts associated with your Account. On this page you can Add, Edit, View, or Clone (i.e. duplicate) a contact depending upon your EXTRANet permissions.



# Manage Profile - Contacts (cont'd)

**Update Contact**

**SAVE**

**CANCEL**

**Sections:**

- Contact Information
- Address Information
- Phone Information
- Additional Information
- ecomm
- Social Media
- General

**Contact Information**

**Account:** ◀Required  
Simpleview Hotel and Conference Center ▼

**Last Name:** ◀Required  
Berry

**Department:**

**Contact Type:** ◀Required  
Primary ▼

**First Name:** ◀Required  
Angel

**Full Name:** ◀Required  
Angel Berry

**Title:**

**Preferred Contact Method:**  
Email ▼

When you view or edit a contact, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a contact, the top left will display an Edit button. If you are editing a contact, the top left will display a Save button. You must click the Save button before changes are applied!

**IMPORTANT NOTE:** If a contact has left your business, it is your responsibility to notify the Bureau and/or change their contact type to “Inactive”.

# Manage Profile - My Benefits

**Benefits**

- Listings
- Offers
- Fam Trips
- Events
- Leads/RFPs
- Service Requests
- Inkind/Expenses
- Social Mentions
- Press Mentions

FROM  
**Month**  
September

**Year**  
2014

**Listings** [See Details](#) Views

Month	Count
Sep	0
Oct	0
Nov	1
Dec	0
Jan	1
Feb	3
Mar	2
Apr	0
May	0
Jun	0
Jul	0
Aug	0

**Offers** [See Details](#)

Month	Count
Sep	0
Oct	0
Nov	0
Dec	0
Jan	0
Feb	0
Mar	0
Apr	0
May	0
Jun	0
Jul	0
Aug	0

**Press Mentions** [See Details](#) Mentions

Month	Count
Sep	0
Oct	0
Nov	0
Dec	0
Jan	2
Feb	0
Mar	3
Apr	0
May	0
Jun	0
Jul	0
Aug	0

**Events** [See Details](#) Attended

Month	Count
Sep	0
Oct	0
Nov	0
Dec	0
Jan	0
Feb	0
Mar	0
Apr	0
May	0
Jun	0
Jul	0
Aug	0

After you click the Profile icon and then My Benefits, you will be presented summary reports based on the Bureau's interaction with your business. The information you see on this page is specifically related to your Account.

# Manage Profile - Invoices

**Invoices**

+ Filters (0) [Manage Filters](#)

You have not added any filters. You can click the manage filters link in the top right corner or click the icon from the grid to add filters from the available list and set a default value to use in the future.

Page 1 of 1 Go to Page:

Actions	Invoice ID	Account	Type	Invoice Date	Invoice Amount	Paid Amount	Balance Due	Payment Date	Description	
	1565	Simpleview Hotel and Conference Center	Membership	11/13/2009	\$2,060.00	\$0.00	\$2,060.00		Test	
		Simpleview Hotel and Conference Center	Membership	12/02/2014	\$300.00	\$0.00	\$300.00			

After you click the Profile icon and then Invoices, you will be presented with a list of invoices sent to your Account. To view the details of the invoice you can either click the eyeball icon or the Print icon. To pay an invoice, click the eyeball icon to first view the invoice. You can only pay Membership invoices through the EXTRANet.

# Manage Profile - Invoices (cont'd)

RETURN

PRINT INVOICE

PAY NOW

Sections:

- Recipient Details
- Invoice Details
- Payment Details
- General

Type: Membership

Description: Test

Invoice Date: 11/13/2009

Due Date: 11/13/2009

Invoice Amount: \$2,060

Paid Amount: \$0

Balance Due: \$2,060

Payment Date:

Payment Method:




Payment Details

Actions	Payment ID	Payment Method	Payment Date	Amount
No Records Were Found				

When viewing an invoice you can see the payment history associated to the invoice. If the invoice has an outstanding balance, you will see a Pay Now button in the top left of the page. Clicking the Pay Now button will take you to a secure page to pay using a credit card, much like any online payment portal on the internet.

# Collateral - Listings

The screenshot shows a web interface for managing listings. On the left is a dark sidebar with icons for user profile, document, bell, pie chart, and wrench. The main content area is titled 'Listings' and contains a 'Filters (0)' section with a 'Manage Filters' link. Below this is a blue 'ADD LISTING' button with a red arrow pointing to it. The main part of the interface is a table with the following columns: Actions, Company, Listing Type, Category, Subcategory, and Listing ID. A single listing is shown for 'Simpleview Hotel and Conference Center' with a 'Website' listing type, 'Accommodations' category, and 'Luxury Resorts' subcategory. The 'Actions' column for this listing contains three icons: a pencil (edit), an eyeball (view), and a clone icon (duplicate). A red arrow points to the eyeball icon. At the bottom right of the table, there is a pagination control showing 'Page 1 of 1' and 'Go to Page: 1'.

Actions	Company	Listing Type	Category	Subcategory	Listing ID
  	Simpleview Hotel and Conference Center	Website	Accommodations	Luxury Resorts	41983

After you click the Collateral icon and then Listings, you will be presented with your business's listings. These listings may be website listings or publication guide listings. The pencil icon will allow you to edit your listing information. By clicking the eyeball icon, you can view your listing information. The clone icon will allow you to duplicate a listing. You can also create a new listing by clicking the Add Listing button.

**NOTE:** Members can have up to 5 listings (in different categories) on SeeMonterey.com

# Collateral – Listings (cont'd)

**Update Listing**

**SAVE**

**CANCEL**

Sections:

- Listing Information
- Categories
- Details
- Website Notifications
- Listing Image
- Social Media
- General

**Listing Information**

**Account:** Required  
Simpleview Hotel and Conference Center

**Type:** Required  
Website

**Contact:**  
Alena Chaika

**Address Type:**  
Physical

**Listing Description:**  
Testing GEO-Coding Test test test

When you view, edit, or add a listing, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing a listing, the top left will display an Edit button. If you are editing a listing, the top left will display a Save button. You must click the Save button before changes are applied!

**IMPORTANT NOTE:** Any edits or adding of listings will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/additions.

# Collateral – Listings (cont'd)

The screenshot shows a web application interface for editing listings. On the left is a dark sidebar with a vertical list of sections: Listing Information, Categories, Details, Website Notifications, Listing Image, Social Media, and General. At the top of the main content area are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these are two input fields: 'Email To Notify' (empty) and 'Notification Interval' (containing '0'). The 'Listing Image' section is highlighted with a grey background and contains a 'Listing Images:' label above a pull-down menu. The menu is currently set to 'HOTEL (IMAGES2.JPG)' and has a red arrow pointing to it from the right.

When you edit or add a listing, you can select one or multiple images to associate to the listing by selecting the Listing Images pull down menu. As mentioned previously, any edits or adding of listings will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/additions. More on images in the Collateral – Media slide.

NOTE: Not all listing types allow for images to be added.

# Collateral – Special Offers

**Offers**

+ Filters (0) [Manage Filters](#)

You have not added any filters. You can click the manage filters link in the top right corner or click the icon from the grid to add filters from the available list and set a default value to use in the future.

**ADD OFFER**

Page 1 of 1 Go to Page:

Actions	Offer Title	Redeem From	Redeem To	Post From	Post To	Pending	
	20% Off Rooms Sunday through Thursday Nights	08/01/2015	08/31/2015	08/01/2015	08/31/2015	No	

Page 1 of 1 Go to Page:

After you click the Collateral icon and then Special Offers, you will be presented with your business's offers. The pencil icon will allow you to edit an existing offer. By clicking the eyeball icon, you can view the existing offer. The clone icon will allow you to duplicate an offer. You can also create a new offer by clicking the Add Offer button. There is no limit to the number of special offers that you have as long as they are open to the public, have a discount or "offering" of some sort and are for valid dates.



# Collateral – Special Offers (cont'd)

Update Offer

SAVE

CANCEL

Sections:

- Offer Information
- Offer Image
- Offer Dates
- Offer Categories
- Offer Listings
- General

Offer Information

Account: <Required>

Simpleview Hotel and Conference Center

Offer Title: <Required>

20% Off Rooms Sunday through Thursday Nights

Offer Link:

www.simpleviewinc.com

Offer Text:

Get 20% Off Rooms Sunday through Thursday Nights in the month of August!

Offer Image

Offer Image:

Hotel ( images2.jpg )

When you view, edit, or add an offer, you can quickly scroll to a section on the page by clicking the links of the left of the page. If you are viewing an offer, the button in the top left will say Edit. If you are editing an offer, the top left will display a Save button. You must click the Save button before changes are applied! As with listings, you have the ability to attach images to your offers.

**IMPORTANT NOTE:** Any edits or adding of offers will require approval from the Bureau. Upon saving your updates, the Bureau will be notified of your changes/adds.

# Collateral – Media

The screenshot displays the Media management interface. On the left is a dark sidebar with icons for user profile, media, notifications, analytics, and settings. The main content area is titled 'Media'. It features a filters section with 'Filters (0)' and a 'Manage Filters' link. Below this is a dropdown menu for 'Account is one of:' with a 'CHOOSE' button and an 'APPLY FILTERS' button. A blue 'ADD NEW MEDIA' button is highlighted with a red arrow. Below the button is a table with columns 'Actions', 'Title', and 'Image'. The table contains one row for 'Hotel' with a cityscape image. The 'Actions' column for the 'Hotel' row contains three icons: a pencil (edit), a red 'x' (delete), and a clone icon. A red arrow points to these icons. The table also includes a 'Page 1 of 1' and 'Go to Page: 1' navigation control.

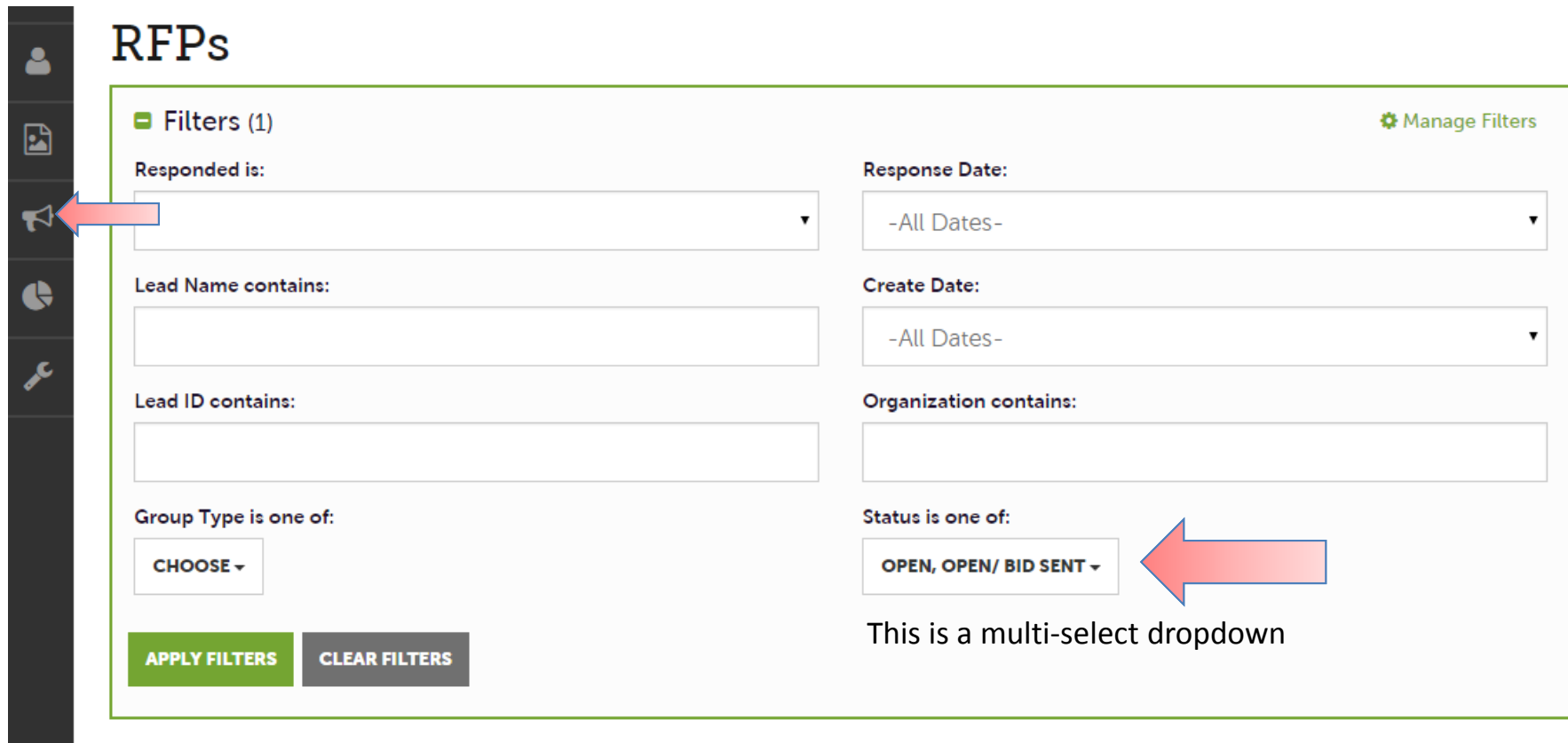
After you click the Collateral icon and then Media, you will be presented with your Account's images available for use on listings and special offers. The pencil icon will allow you to edit an existing image. By clicking the red x icon, you can delete an existing image. The clone icon will allow you to duplicate an image. There is no limit to the number of images that you can upload.

# Collateral – Media (Cont'd)

The screenshot displays a media management interface. On the left, a vertical sidebar contains a wrench icon and two buttons: 'SAVE' (blue) and 'CANCEL' (grey). Below these is a 'Sections:' label and a link for 'Media Information'. The main content area is divided into several sections: 1. A dropdown menu currently set to 'Image'. 2. A 'Description:' label followed by a large text input field. 3. A 'File:' label followed by a large dashed border area containing the text 'Drag and Drop File To Page' and 'or use the "Browse" button below to find a file to add'. A red arrow points to this area. Below this area are two buttons: 'BROWSE' (blue) and 'REMOVE' (orange). Below the buttons is the text 'You can drag a file to the page to replace this file or use the "Browse" button'. 4. A 'Listings:' label followed by a dropdown menu with the text 'CHOOSE AMONG THE FOLLOWING...'. A red arrow points to this dropdown menu.

You can browse your hard drive or drag and drop an image. You must upload one image at a time. Once you upload a new image or edit an existing one you can attach the image to one or multiple listings by selecting the Listings pull down menu. Optimal image type is JPG with 300 DPI resolution; pixel size 203w x 142h.

# Opportunities – RFPs



The screenshot shows a sidebar on the left with icons for user profile, document, RFP (highlighted with a red arrow), pie chart, and key. The main content area is titled "RFPs" and contains a filter grid. The grid has a "Filters (1)" header and a "Manage Filters" link. The filters are arranged in two columns:

- Left Column:**
  - Responded is: [dropdown]
  - Lead Name contains: [text input]
  - Lead ID contains: [text input]
  - Group Type is one of: [CHOOSE dropdown]
- Right Column:**
  - Response Date: [-All Dates- dropdown]
  - Create Date: [-All Dates- dropdown]
  - Organization contains: [text input]
  - Status is one of: [OPEN, OPEN/ BID SENT multi-select dropdown, highlighted with a red arrow]

At the bottom of the filter grid are two buttons: "APPLY FILTERS" (green) and "CLEAR FILTERS" (grey). Below the "Status is one of" dropdown, the text "This is a multi-select dropdown" is displayed.

After you click the RFP icon and then RFPs, you will be presented with your Account's Sales and Tour Leads. The filters in this grid determine what Leads are presented. You can change your filters to narrow your results. This is done by editing the filter fields and clicking the Apply Filters button. By Default, you will see all of your Open Leads and the Opens Leads you have already bid on. For more on Lead statuses and their definitions see the next slide.

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# Opportunities – RFPs (cont'd)



## LEAD STATUS DEFINITIONS

On the EXTRANet you will see 10 different statuses in which a Lead can be in. These statuses are:

- 1. Closed / No Bid Sent:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Closed/No Bid Sent status signifies this is business your property did not bid on and the response due date has passed.
- 2. Open:** These are Leads in a tentative status that your property has not bid on and the response due date has not passed.
- 3. Open / Bid Sent:** These are Leads in a tentative status that your property has already placed a bid on and the response due date has not passed. In this status, you can update your response at any time.
- 4. Turned Down:** These Leads can be Tentative, Definite, Lost, or Cancelled. The Turned Down status signifies you responded to the Lead, but stated you are not pursuing the business.
- 5. Closed / Decision Pending:** These are Leads in a tentative status that your property has placed a bid on, but the response due date has passed thus you cannot edit your response.
- 6. Closed / Lost to Another City:** These are Leads you were pursuing, but the business has been lost.
- 7. Closed Cancelled:** These are Leads where you won the business, but the group has cancelled.
- 8. Closed / Won:** These are definite Leads in which your property was selected.
- 9. Closed / Won - Properties TBD:** These are definite Leads but the group has not decided on a hotel yet.
- 10. Closed Lost:** These are definite Leads in which your property was not selected for the business.

# Opportunities – RFPs (cont'd)

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016	
	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016	

Below the filters section, you will see a data grid with all your Leads based on the selected filters. As mentioned in the Filters and Data Grid section of this presentation, you can change these data grid column headings to your preference by clicking the sprocket icon in the top right corner of the data grid. One of the more important column headings is the Group Type. This signifies if you are looking at a Meeting Sales or Tour Lead.

To view a Lead, click on the Eyeball icon or the Lead Name

# Opportunities – RFPs (cont'd)

Page 1 of 1 Go to Page: 1

Actions	Lead ID	Lead Name	Status	Create Date	Group Type	Lead Type	Organization	Account	Response Date	Arrival (Preferred)	Departure (Preferred)	
	12063	Test Meeting 2016	Open	02/13/2015	Meeting		Association of Simpleview Professionals	Simpleview Hotel and Conference Center	01/01/2016	02/16/2016	02/19/2016	
	12005	2016 Annual Convention	Open	10/27/2014	Meeting	Convention	Microsoft SV	Simpleview Hotel and Conference Center	08/15/2015	02/01/2016	02/06/2016	

For Lead Catchers, click on the Sprocket, and add the column “Assign Contact”.

The screenshot shows the 'RFPs' interface with a 'Columns' dialog box open. The dialog box has a search bar and a list of columns with checkboxes. The 'Assigned Contact' checkbox is checked, while others like 'Decision Date' and 'Group Name' are unchecked. The background interface shows filter options for 'Responded to', 'Lead Name contains', 'Lead ID contains', 'Group Type is one of', 'Response Date', 'Create Date', 'Organization contains', and 'Property Lead Status is one of'.

# Opportunities – RFPs (cont'd)

For Lead Catchers, you can assign a lead to a sales contact in the “Responses” section.


**Responses**


Monterey Marriott

Status Open/ Bid Sent

Currently Assigned None [\(Assign\)](#)

[PRINT RESPONSE LOG](#)

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/02/2017 - 09/08/2017	Yes	.





# Opportunities – RFPs (cont'd)

**RETURN**

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

crm@simpleviewinc.com  
123.123.1234

Meeting Requirements: See attached RFP for more details.

Schedule of Events

Action Requested

Comments

Competitive Sites

Meeting Specs: 2016-Annual-Convention-RFP.docx

Lost Business Code

Lost Comments

When viewing the Lead, you can skip to different sections by clicking the left navigation. For notes and attachments on the Lead, these can generally be found in one of two areas: Lead Information and/or Notes section. In the above graphic, this is the Lead section; attachments will be found in the Meeting Specs field. There should be no limit on the file size for attachments. For the Notes section, see next slide.

# Opportunities – RFPs (cont'd)

**RETURN**

Sections:

- Lead Information
- Meeting Dates
- Additional Lead Information
- Room Summary
- History/Futures
- Notes
- Responses
- Signage
- General
- Room Data

**Notes**

File	Title	Category	Description
	2016 Annual Convention RFP	Spec Sheet	See attached RFP

**Responses**

Simpleview Hotel and Conference Center

Status: Open

Currently Assigned: None ([Assign](#))

[PRINT RESPONSE LOG](#) [ADD NEW CONTRACT](#)

Add/Edit	Room Request Dates	Pursuing?	Comments
	02/01/2016 - 02/05/2016		

When scrolling to the Notes section, you will see the detailed notes for this piece of business. If an attachment is present, this will be signified with a paperclip icon. After you have reviewed the Lead, scroll to the Responses section. Here you will see options to either add or edit your existing response. Note: these options are not available once the Response Due Date has passed. Click the Add Response button or Pencil icon to enter/edit your response.

# Opportunities – RFPs (cont'd)

## Update Response

SAVE

CANCEL

### Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments

### Lead Information

Section Collapsed, click header to expand.

### Response Information

Pursuing this lead: **Required**

NO

YES

Account: **Required**

Simpleview Hotel and Conference Center

Comments: **Required**

When adding/editing your response, you will need to tell the Bureau if you are pursuing the business by selecting Yes or No to the Pursuing this Lead option.

# Opportunities – RFPs (cont'd)

SAVE

CANCEL

Sections:

- Lead Information
- Response Information
- Room Information
- File Attachments
- General

Room Information

	Thu 02/10/2022	Fri 02/11/2022	Sat 02/12/2022	Sun 02/13/2022	Mon 02/14/2022	Tue 02/15/2022	Wed 02/16/2022
ROH (Run of House)	0	0	0	0	0	0	0
Kings	0	0	0	0	0	0	0
Queens	0	0	0	0	0	0	0
Doubles	0	0	0	0	0	0	0
Suites	0	0	0	0	0	0	0
Singles	0	0	0	0	0	0	0
Any	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0
Requested	10	125	550	675	675	600	500

The Room Information section of the response page is where you can enter the number of rooms, by room type, that your property can commit to for this Lead. The first option “ROH” is to be used when the client has their choice of room type.

# Opportunities – RFPs (cont'd)

The screenshot displays a user interface for managing RFP responses. On the left, there are two buttons: a blue 'SAVE' button and a grey 'CANCEL' button. Below these is a 'Sections:' menu with four items: 'Lead Information', 'Response Information', 'Room Information', and 'File Attachments'. The 'File Attachments' item is highlighted with a red arrow. The main content area is divided into two sections. The top section is a summary table with the following data:

Total	0	0	0	0	0
Requested	10	10	10	10	10

The bottom section is titled 'File Attachments' and contains an 'ATTACH FILE' button, the text 'or drag files to the page', and a message box that says 'No files have been attached'. Red arrows point to the 'ATTACH FILE' button and the 'or drag files to the page' text.

To attach a proposal to your response, scroll to the File Attachments section of the response page and click the Attach File button, to browse for the attachments. You can also click and drag your attachment from your computer to the attach file section.

Once you have finished entering all your response information don't forget to click the save button!

# Opportunities – Media Leads

All Media Leads

Filters (0) Manage Filters

Responded is:  Status is one of:

**APPLY FILTERS**

Page 1 of 1 Go to Page:

Actions	Lead ID	Lead Name	Account	Lead Type	Response Date	Arrival	Departure
	1033	2014 Media Lead	Simpleview Hotel and Conference Center	Article	05/10/2014	05/29/2014	10/15/2015

By clicking the RFP icon and then selecting Media Leads, you can view Leads sent to your property by the Bureau's Media/PR department. These are usually requests for hosting travel writers. These Leads can be responded to by viewing the Lead; see next slide for responding.

Note: Media Leads function the same as Sales and Tour Leads including their statuses. See Opportunities – RFPs section for more details on this.

# Opportunities – Media Leads (cont'd)

**RETURN**

Sections:

- Opportunity Information
- Responses ←
- Notes
- General

→

**SAVE**

**CANCEL**


Sections:

- Lead Information
- Response Information ←
- File Attachments

### Responses

Simpleview Hotel and Conference Center

Status: Open

Add/Edit	Room Request Dates	Pursuing?	Comments
	09/10/2015 - 09/13/2015		

### Response Information

**Pursuing this lead:** Required ←

YES  NO

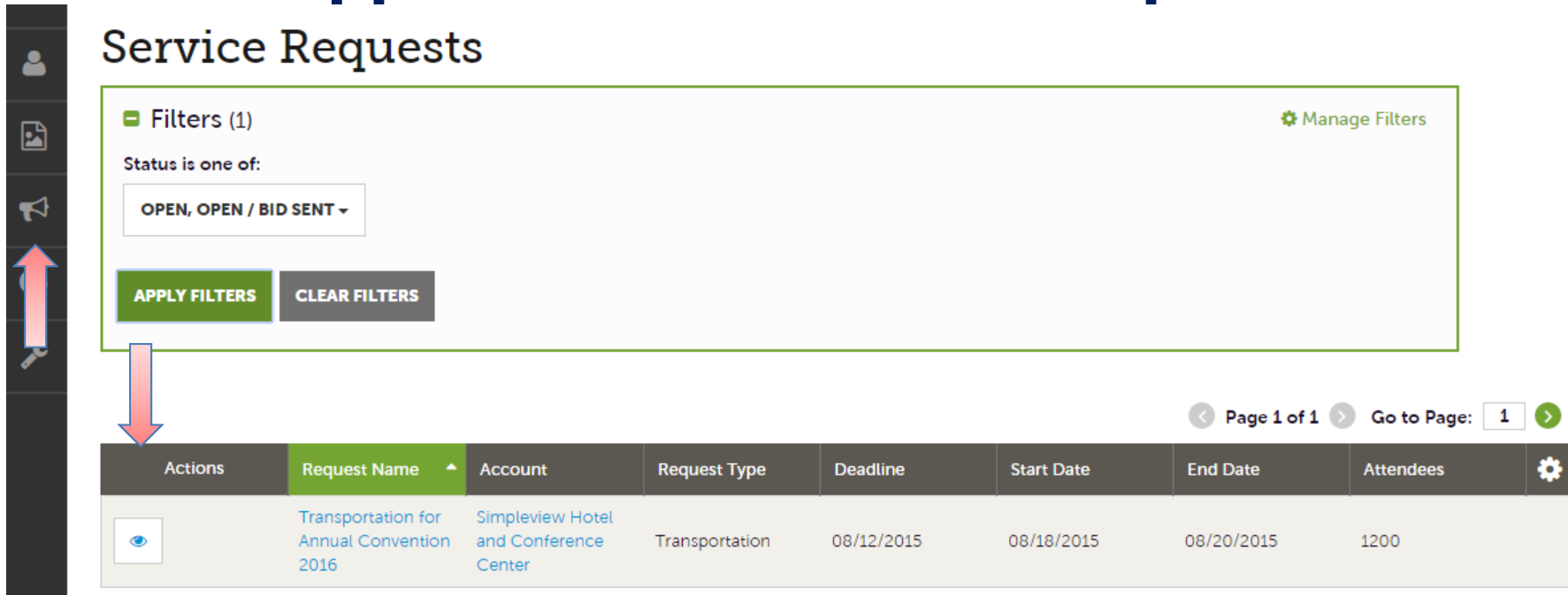
**Account:** Required

Simpleview Hotel and Conference Center ▼

**Comments:** Required

As with Sales and Tour Leads you can also respond or edit an existing response to Media Leads by scrolling to the Responses section and clicking the Pencil icon. Within responses you are also able to specify if you are pursuing the business and add attachments.

# Opportunities – Service Requests



The screenshot displays the 'Service Requests' interface. On the left is a vertical navigation bar with icons for user profile, document, and a bell. A red arrow points up to the bell icon and down to the 'APPLY FILTERS' button. The main content area features a filter panel with the following elements:

- Filters (1) Manage Filters
- Status is one of:
- Dropdown menu: OPEN, OPEN / BID SENT
- Buttons: APPLY FILTERS, CLEAR FILTERS

Below the filter panel is a table of service requests. The table has the following columns: Actions, Request Name, Account, Request Type, Deadline, Start Date, End Date, Attendees, and a settings gear icon. The first row of data is:

Actions	Request Name	Account	Request Type	Deadline	Start Date	End Date	Attendees	
	Transportation for Annual Convention 2016	Simpleview Hotel and Conference Center	Transportation	08/12/2015	08/18/2015	08/20/2015	1200	

Page navigation: Page 1 of 1, Go to Page: 1

By clicking the RFP icon and then selecting Service Requests, you can view non-room night specific Leads sent to your property. These requests can range from transportation, audio/visual, catering, etc...

Once you have adjusted your filters as you prefer, click the eyeball icon to view detailed information about the service request or click the name of the request.



# Opportunities – Service Requests (cont'd)

The screenshot displays a service request interface. At the top left, a dark grey button labeled "RETURN" is visible. Below it, a sidebar lists sections: "Request Information", "Request Dates", "Contact Information", "Additional Notes and Documents", and "Accounts/Responses". The main content area shows details for a service request:

- Attendees: 1200
- Deadline: 08/12/2015
- Budget: \$13,000
- Location: To/From Hotel & Convention Center
- Description: Need transportation shuttles for convention running all day from 7am to 7pm.
- Additional Documents:
  - [2016-Annual-Convention-RFP.docx](#)

Below the details, a message states: "Section Collapsed, click header to expand." The "Additional Notes and Documents" section is expanded, showing a table with the following data:

File	Title	Category	Description
	RFP	Spec Sheet	See attached RFP for more details

Red arrows in the original image point from the sidebar sections to their corresponding content: "Request Information" to the details, "Additional Notes and Documents" to the table, and "Additional Documents" to the document link.

When viewing the service request, you can get detailed information in the Request information section along with RFP attachment downloads. Depending upon the Bureau's preferences, this information may be contained in the Additional Notes and Documents section of the Service Request.

# Opportunities – Service Requests (cont'd)

The screenshot displays a software interface for managing service requests. On the left, a table titled 'Accounts/Responses' is shown with a red arrow pointing to the 'Accounts/Responses' header and another red arrow pointing to a pencil icon in the 'Actions' column. The table has the following data:

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Respo

Below the table is a 'General' section. On the right, a modal window titled 'Response for Simpleview Hotel and Conference Center' is open. It features a 'Pursuing:' section with a red arrow pointing to the 'Required' label and two radio button options: 'YES' and 'NO'. Below this is a 'Comments:' section with a red arrow pointing to the 'Required' label and a text input area.

If the Response Due Date has not passed, you are able to add/edit a response by clicking the Pencil icon in the Accounts/Responses section of the service request. Once clicked, you can tell the Bureau if you are pursuing this piece of business by clicking the Yes or No option in the Pursuing section to the right side of the page.

# Opportunities – Service Requests (cont'd)

The screenshot displays a web interface for managing service requests. On the left, there is a table titled "Accounts/Responses" with the following data:

Actions	Company	Status	Response
	Simpleview Hotel and Conference Center	Open	No Respo

Below the table is a "General" section with the following fields:

- Decision Date
- Food / Beverage
- Misc. Expense
- Category
- Economic Value - Lauren Test

On the right side of the interface, there is a "Bureau-Only Comments" section. It contains a text area for comments and a blue button labeled "ATTACH A FILE" with a red arrow pointing to it. Below this is a message box that says "No files have been attached". At the bottom right, there are two buttons: "UPDATE" (with a red arrow pointing to it) and "CANCEL".

As you scroll down the response page on the right, you have the ability to attach proposals by clicking Attach File button or click and drag the file from your computer. Be sure to scroll to the button and click the Update button to save your changes!